

Oh No! Not Fundraising! How do we get the board excited about fundraising?

Every board member has the potential to fundraise on some level...

Recently, while planning a board retreat for an arts council in Utah, I asked the executive director what outcome she would like to see from the board retreat. Emphatically she exclaimed, “I just want them to be excited about fundraising!” Fundraising is critical to a nonprofit organization’s sustainability. It provides the lifeblood to carry out the mission and vision, but board members often view it as a necessary evil.

As mentioned in chapter 2, the organization’s policy should encourage or even require board members to open up their own wallets and contribute to the organization as a symbol of their commitment to and support for the organization’s mission. Every board member can take this first step to assure adequate resources are available, and when board members have their own resources, this is often the only step needed. In most boards, however, additional fundraising needs to be done and should be an expectation of board members.

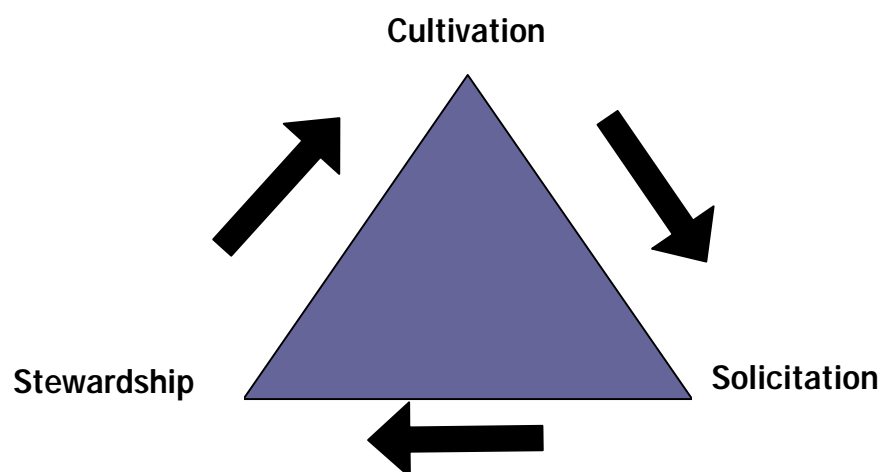
How then do we motivate board members to get excited about their fundraising responsibilities? Nonprofit gurus have wrestled with this question and written volumes on how to fundraise, but few are written on how to generate the synergy needed to effectively fundraise as a body. One answer is to continually create a *fundraising organizational culture*. In this case, organizational culture embodies all the taken-for-granted assumptions of the organization, including the attitudes and beliefs of its members. If a board member understands that this organization has a strong fundraising culture from the first board meeting attended, that person begins to

participate in and enhance this fundraising culture. This is more than just having their fundraising responsibilities articulated in the board member agreement or commitment statement. This permeates all aspects of that board member's interaction with others in the organization. Fundraising dialogue is a strong part of every board meeting, generating excitement by sharing success stories and ideas. The organization introduces a fundraising plan for the entire year with input from board members and with their names listed where they choose to participate. Everyone has something to contribute to the overall plan, even if it is simply writing thank you cards or greeting VIPs at the door.

The Reality

From 2001 to 2002 nonprofit 501c3 organizations in the United States grew in numbers by 5.1% or 44,478. The number of new organizations approved was 64,188 adding up to a total of 909,574 nonprofits. What this means as far as fundraising, aside from the obvious, is that in 1950, there were 5,000 citizens for each nonprofit organization and NOW there are only 350 citizens for each nonprofit. Since the majority of funds for our organizations stem from individual donations, this is a reality check. We need to be more vigilant in our fundraising efforts than ever before in order to sustain our organizations.

Fundraising is a process. It is not simply asking for money and either getting it or not getting it. The process is circular, involving three main components: cultivation, solicitation, and stewardship. Building a relationship with the funder or sponsor often is one of the most critical steps before asking for money or in-kind donations. This may take up to a year of diligent conversations, exploration of needs, research or simply asking questions about the prospective donor.



The actual ask or solicitation is the next step in the fundraising process. This can take many forms beyond a personal visit and forthright ask, which often can only be done effectively by a few board members. A formal invitation to donate in the form of grants or proposal letters is another way to ask. Some organizations offer concert series and ask their season ticket holders to add a donation to their purchase. Often, membership drives ask for additional amounts beyond the services offered for the membership. These are all forms of the solicitation.

The final arm of the fundraising cycle is stewardship. This is an area where many board members can really participate fully. Letting a funder know you appreciate their contribution and how that has made a difference in the organization and for the community is vital. Donors want to be part of a success story. They want to hear how their money has made a difference. Any way you can do this, by telling the stories we all share and see on a daily basis, will enhance the ongoing relationship with that donor. Below is a list of a few ideas for ways to exercise stewardship. These are just a few of the many ways you can complete the cycle which, in turn, begins cultivating again.

STEWARDSHIP IDEAS

1. **Make a personal phone call and let the donor share in the success of the event.**
2. **Send newspaper clippings or other media PR to the donor with a letter thanking them.**
3. **Recognize the donor in all printed media and at any event they funded. (*unless otherwise requested*)**
4. **Never underestimate the emotion of a personal story. Share them with the funders.**
5. **Invite donors to VIP gatherings and any event that will acquaint them with your mission.**
6. **BE SURE TO FILL OUT AND SEND IN EVALUATION REPORTS...ON TIME!**
7. **Let the funder know when their support has contributed to the capacity of the organization and the ability of the organization to sustain itself and serve its mission.**
8. **Arrange to have the donor or a representative of the foundation meet the people they have had an impact on.**
9. **DO WHAT YOU TOLD THE DONOR YOU WOULD DO WITH THE FUNDS.**
10. **Take pictures and videos, record stories.**

Understanding your level

I recently found an article from the National Center for Nonprofit Boards that was like an epiphany for me. I personally have never liked to impose on others and asking for money seemed the ultimate imposition (I have since changed my position). After considering the message in this article, I realized that even I could make significant contributions to the fundraising culture of any organization I served. The key to creating this fundraising culture is finding a level that every board member is comfortable with and motivating them to participate on that level until they feel they can participate on a more involved level. (a copy of this assessment is at the end of this chapter)

By taking a few minutes and filling out this assessment, each board member will better understand their capabilities in fundraising. Having this information also assists in formulating the overall fundraising plan with each and every board member's participation. It can help the executive director and board chair identify areas where board members may need additional training. Often we expect board members to join the board already equipped and educated in fundraising. If we make training an ongoing effort at board meeting and retreats, we enhance our fundraising culture.

Fundraising Plan

Finally, one of the most useful tools an organization can implement is an overall fundraising plan. This yearly, calendar-type plan lists every fundraising event, grant, cultivation activity etc. with who will do what, where, how, etc. It can also be a valuable tool in projecting fundraising revenue. Board members can see the “big picture” of the organization’s annual fundraising and how each board member contributes. Having this tangible plan in front of them perpetuates the fundraising culture at every board or committee meeting. I have included a sample plan at the end of this chapter. You may want to change the format or use your own computer program. The fundraising plan can be the result of board planning meetings where each board member contributes their ideas or may be assigned to a special fundraising committee or development staff member. Remember that the more input you gather from the board, the more support you will have in implementing the plan. The effort is well worth the results.

Motivating your board to fundraise is a challenge, but creating a fundraising culture and allowing each board member to contribute on their level is a giant step in the right direction. Donors recognize organizations with fundraising energy where all three arms of the fundraising cycle are fully functioning. These are the organizations that are able to fulfill their mission and create a sense of stability in the nonprofit sector.



IDEAS & TOOLS TO USE THIS INFORMATION

As a Board Member:

- Make the time to fill out the fundraising assessment to determine your own level of comfort in fundraising. Use this tool as an ongoing assessment of where you are in the organization's fundraising scene.
- Contribute to the fundraising culture with your unique skills and talents.
- Have a willing, not begrudging, attitude when fundraising is discussed.
- Be open to new ideas and ways of doing things.
- Make the time to participate in fundraising training or planning meetings.
- Be willing to advocate for the organization in social and business circles. Share names of associates and educate others as to the mission of the organization and all its noteworthy accomplishments.

As a Board Chair:

- You are the guardian of the fundraising culture. Your enthusiasm will go a long way in creating excitement for fundraising.
- Support your executive director or development staff in their fundraising efforts. Ask them frequently how the board can assist them.
- Train your radar on environmental influences in the community that may impact your fundraising effort.
- Make fundraising a vital part of every board meeting and a focus at board retreats. The fundraising plan can be a part of every budget discussion.
- Make sure every new board member understands his or her role as a fundraiser for the organization in both "giving and getting." Help them understand they can do this on many levels.
- Create opportunities to learn more about fundraising.

As an Executive Director:

- Create a fundraising culture with staff as well as the board.
- Coordinate fundraising activities between staff and board.
- Stay abreast of the fundraising scene by networking and attending seminars or conferences, etc.
- Subscribe to legitimate publications or online newsletters for updated fundraising information to pass on to the board and staff
- Be the driving force behind the fundraising plan
- Be sure and thank the board and staff whenever appropriate for their contributions to fundraising efforts, whether successful or not.

FUNDRAISING RESPONSIBILITIES AND OPPORTUNITIES FOR NONPROFIT BOARD MEMBERS

How many are YOU willing to consider and undertake?

Mark each: **Y**=Yes **M**=Maybe **N**=No **?**=Don't Understand

Be honest. Be realistic. Be willing to try something new.

LEVEL ONE

- ____1. **Commit** to the organization's vision and mission. Be willing to learn more about how to "give and get" contributed resources.
- ____2. **Provide informed input** into a market-oriented planning process; help decide which goals deserve priority, given organizational capabilities, resources, depth of volunteer commitment, and relevant strategies for implementation.
- ____3. **Aid in the development of and vote support** for the fund development plan. Understand the plan's implications and be willing to help execute it. (If you cannot, state why this is and be willing to work toward consensus on some revisions.)
- ____4. **Assist in drafting** the fund-raising case statement—a comprehensive justification for charitable support—and be able to **explain** this rationale persuasively.
- ____5. **Decide** realistic budget allocations for the organization's fund-raising program. (Be patient about how fast new income will be received, but ask questions, offer suggestions, and operate by agreed upon procedures and assignments.)
- ____6. **Review, critique, and monitor** the action strategy: a policy and procedure outline of how and when the program is to be implemented (for example, type of fund-raising on which to concentrate, methods of approach, ways to identify target markets, how gifts are to be sought, allocated, reported, acknowledged,

- and then leveraged for more). Help **establish** specific benchmarks for desired outcomes.
- ____7. **Understand** the organization's financial situation and probable future funding position. Oppose quick fixes and short-range decisions. **Probe** until you become convinced money is wisely used and staff is accountable. **Insist** that the board get serious about the necessity of "fiscal fitness."
- ____8. **Evaluate** progress by asking friendly—but searching—questions: Are we doing what we agreed to do? If not, why not? Are we getting improved results as time goes on? What specifically? If not, why? What reasonable changes might be explored? What do we require that is not now available? Expertise? Staff time? Volunteers? Commitment level (Think of fundraising as a marathon, not a sprint—sustained momentum is the key to success.)
- ____9. **Join and get active** on at least one board committee and be alert for how its work can strengthen current fund-raising endeavors. (Almost every aspect of the operation has some impact on development, directly or indirectly.)
- ____10. **Support** the chief executive's leadership and his or her management of staff. (If that every becomes difficult, talk with the board chairperson or the chief executive about your concerns and offer to aid in finding solutions.)
- ____11. **Approve** the creation or revision of a board member statement of responsibilities that includes clearly defined expectations for trustee personal giving and involvement in fundraising.
- ____12. **Help the board establish** goals for board giving.

LEVEL TWO

- ____13. **Provide** the names and addresses of donor prospects for the development mailing list. Share pertinent (not

private) information about your contacts: individual preferences, interest level, any misgivings about the cause, and their inclination to donate money.

- ____14. **Volunteer** to supplement the work of clerical or other development staff as requested. For instance, proofread material, sort and file, take minutes, fill in for the receptionist, prepare mailing packages, help set up a room, or locate what is needed for a productive meeting.
- ____15. **Confirm** with each person who is to attend the day, date, time, place, and assignment(s) for important meetings. Follow up by sending a summary of the meeting to those who missed it.
- ____16. **Attend** training workshop(s) to discover how to better carry out your role and augment the overall development process.
- ____17. **Recruit** volunteers and prospective helpers and suggest ways to interest and involve persons with whom you or your friends are acquainted.
- ____18. **Advocate** for the organization or cause and serve as an enthusiastic community relations representative. Understand the organization's mission and programs and be able to answer common questions. **Prompt** others in the community to begin participating in the work of the organization.
- ____19. **Originate** introductions and access to individuals or groups where you have credibility and influence. **Cultivate** prospects and donors on a regular basis.
- ____20. **Distribute** (hand deliver) invitations or promotional material to targeted markets: individuals, businesses, churches, temples, community groups, or clubs.
- ____21. **Facilitate** more varied media contacts for wider publicity and promotion. **Link** your organization with regional councils, societies, or associations. **Seek** out wider sponsorship for events, programs, or educational sessions.

- ___22. **Join** the speakers' bureau or agree to be a spokesperson for your organization at some specific occasion or event.
- ___23. **Find and relate** one or more human interest stories to illustrate why gifts are needed and how they are used to provide, enhance, or expand your organization's outreach and impact.
- ___24. **Brainstorm** innovative ways to thank and recognize donors. For instance, arrange a special "thank-a-thon" where donors are phoned to express gratitude for their contributions, with no solicitation included in the conversation.
- ___25. **Research** individual prospects, foundations, and corporate funding sources through public information sources. **Locate** promotional partners or establish a joint venture. **Summarize** your findings for staff or committee use.
- ___26. **Write** a personal testimonial or letter of support for public use or agree to be quoted as to why you support the organization.
- ___27. **Hand-deliver** thank-yous, acknowledgments, or special awards to volunteers, contributors, or support groups.
- ___28. **Participate** in an evaluation session, during which you help campaign leaders gather the information they need about giving patterns and capacity of identified prospects.
- ___29. **Assist** in fund-raising special events, such as auctions, fairs, bazaars, open houses, tours, or tournaments. **Enlist** others to help in ways that they perceive are useful and fun, so they will want to do it again. **Welcome** newcomers; circulate and mingle to spread a friendly spirit, learn names, and discover common ground.
- ___30. **Sell** products, tickets, or premiums where proceeds directly benefit your organization.
- ___31. **Visit** a community leader to explain needs to be met and accomplishments of the organization. **Initiate** follow-up to sustain and increase interest.

- ___32. **Host**—in your home or at a restaurant—a small group of volunteers or donor prospects to better acquaint them with the value of your organization’s priorities: educational programs, advancement of a cause, or effective human services delivery.

LEVEL THREE

- ___33. **Contact** local businesses and vendor suppliers to seek an in-kind donation, such as supplies, equipment, technical assistance, or personnel (interns, released time, loaned executives, etc.)
- ___34. **Personalize** the annual direct mail program or other endorsed campaign by using at least two of the following techniques:
- Hand address envelopes for use with top donors
 - Add a personal PS or thank-you on the prepared acknowledgment
 - Compose and send your note of appreciation for a gift
 - Send your own appeal (samples can be provided) to selected persons
 - Phone to thank some of those who responded
- ___35. **Include** the organization in your annual charitable giving.
- ___36. **Increase** your donation each year to reach the goal and assist in setting the pace for others, so that you will become a credible solicitor.
- ___37. **Request** a pledge or a contribution from designated prospects or lapsed donors in a group phonathon—or on your own within a prescribed time frame.

- ___38. **Solicit** a cash contribution from a service club, civic group, or church or temple, or request a gift for a particular promotion or publication.
- ___39. **Accept** a leadership role to organize solicitation teams or a specific campaign. Before your term is completed, **enlist** your replacement.
- ___40. **Consider** making your organization part of your charitable estate planning through a bequest or life income plan.
- ___41. **Allow** your organization to release your financial commitment to the public to raise awareness of the cause and stimulate others to give.
- ___42. **Ask** selected individuals for a specific gift or a multi-year pledge, going to see them personally, accompanied by a staff member or another volunteer.

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SAMPLE FUNDRAISING PLAN RIVERVIEW ARTS COUNCIL

Strategy	Goal/s	Action Steps	Who	When	Cost
New Member Acquisition (<i>Friends of the council program</i>)	100 new members \$5,000	1. Do 2 direct main campaigns to 1,000 prospects. (50) 2. Have each board and staff member recruit 1 new member (25) 3. Participants in art education program become members(10) 4. Season concert ticket holder requests (15)	Staff Board/staff Staff Staff or Committee	May & September Jan-Dec August April	\$500 no cost no cost no cost
Special Event—Christmas Dinner Theatre	\$5,000	1. Prepare an invitation list and mail invites 2. Find location and contact person 3. Have board members make invites 4. Schedule entertainment and catering	Staff or committee Board Staff	September September November September	\$500 no cost no cost \$1500
Major Donors	\$10,000	1. Research prospects and ask board members. 2. Create a special donor club with benefits 3. Schedule personal visits or write letter. 30 donors: 20@ \$100, 8 @ \$300, 4@ \$500	Staff/Board Staff Staff/Bd	Ongoing all year	\$200
Foundations	\$30,000	1. Research & prepare list of prospects for specific programs. 2. Prepare and mail out proposals. 3. Follow up	Intern/Staff Staff Bd member	Jan Feb April	No cost \$100 no cost
Businesses	\$6,000	1. Identify local businesses for possible win-win situation 2. Talk with contact person or hold luncheon. 3. Send proposals out to selected corporations	Staff and Board Board Staff/board Staff	Jun – Jul April May	No cost \$200 \$100
Planned Giving		Put an ad about bequests in every other issue of newsletter.	Staff	Ongoing	No cost
Total Projected Income \$56,000			Total Expenses \$3,100		

Fundraising Plan Form

Strategy	Goal/s	Action Steps	Who	When	Cost
Total Income \$			Total Expenses \$		